

# Personal Financial Website Overview

This user guide will provide an overview of the features on your Personal Financial Website. Your website is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish three security questions and set up 2-Factor Authentication.

Your **Home** page is a living snapshot of your financial wellbeing, providing a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a section of the website. Begin customizing your experience by clicking the **gear icon** in your Net Worth and Investments tiles.

The screenshot displays the 'Home' page of the Personal Financial Website. At the top, there is a navigation bar with 'Home' highlighted, and other options like 'Organizer', 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. Below the navigation, a welcome message reads 'Welcome, Frank and Joanna Miller'. The main content area is divided into several sections:

- Accounts:** A list of account types with their current balances: Cash (\$25,000), Credit Cards (-\$3,643), Taxable (\$62,684), Tax Advantaged (\$451,838), Life Ins Cash Values (\$14,500), Loans (-\$426,385), Property (\$1,295,000), and Stock Options (\$0).
- Net Worth:** A blue tile showing a total net worth of \$1,254,345 as of today. It also displays a decrease of \$581,222 this month and \$421,668 year to date. A gear icon in the top right corner is highlighted with a red arrow.
- Investments:** A green tile showing a total investment value of \$726,180 as of today. It also displays a decrease of \$1,320 in change and a -0.18% change. A gear icon in the top right corner is highlighted with a red arrow.
- Goals:** A section titled 'Goals as of today' with a 'View All' link. It lists three goals: Retirement (2032-2068, 12 of 37 years projected funding), College for Mary Beth (2020-2023, \$212,323 of \$212,323 projected funding), and College for Lucas (2022-2025, \$229,649 of \$229,649 projected funding).
- Spending:** A section titled 'Spending' with a 'View All' link. It shows a bar chart with three segments: \$0 Income (green), -\$1,402 Expenses (red), and -\$1,402 Net (blue).

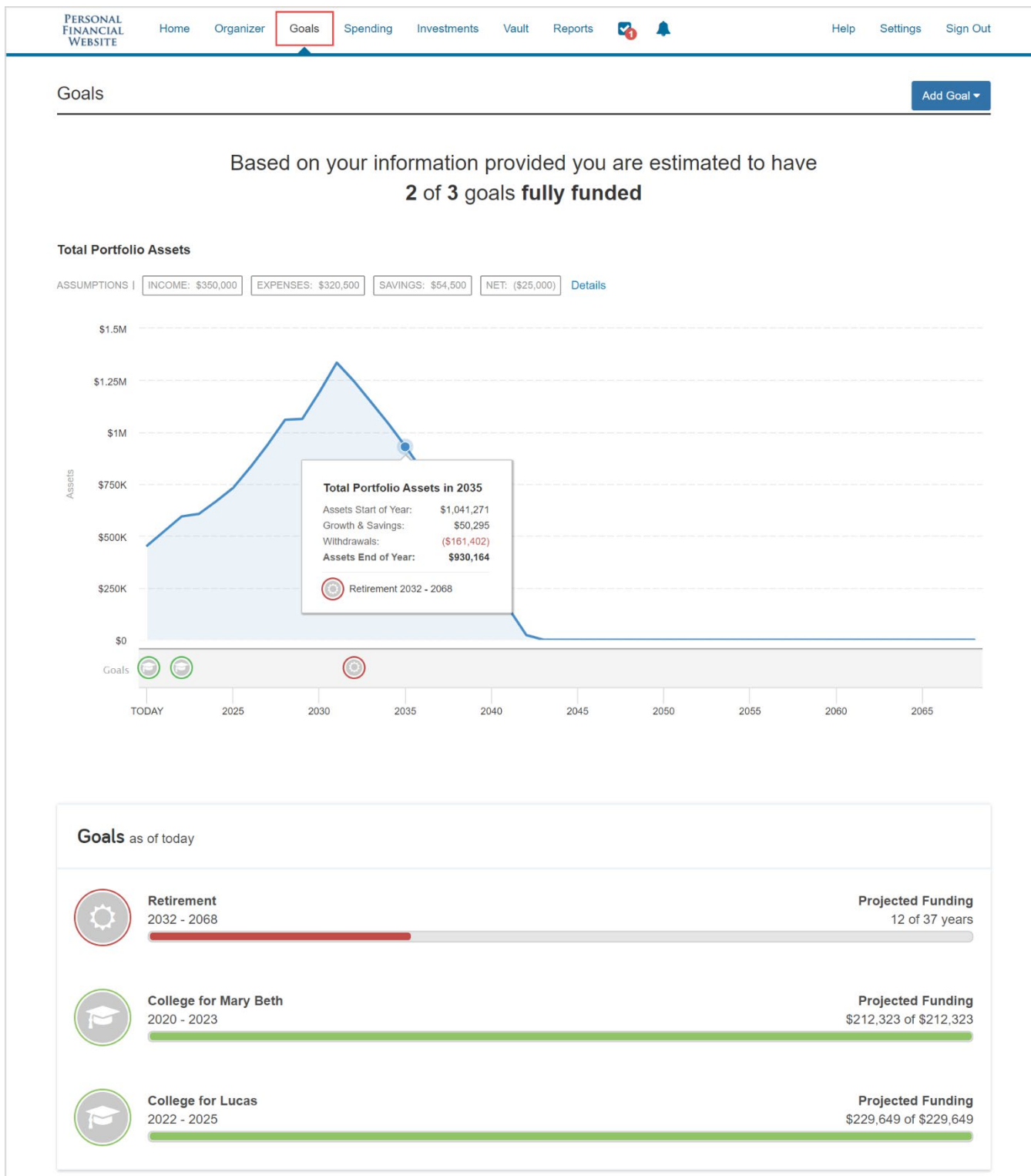
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The **Organizer** will help you to consolidate all your important financial information into one place. You can click the **sections** on the left-hand side to add your accounts, financial data, people and property. The information within the Organizer will be used to populate other areas of the website, including the Home page.

The screenshot displays the 'Organizer' section of a personal financial website. At the top, a navigation bar includes 'Home', 'Organizer' (highlighted with a red box), 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', and utility icons for help and notifications. On the right side of the navigation bar are links for 'Help', 'Settings', and 'Sign Out'. The main content area is divided into two columns. The left column contains a vertical menu with sections: 'Accounts', 'Professional Contacts', 'Income, Expenses, and Savings', 'Future Goals', 'Financial Priorities', and 'Risk Tolerance'. The right column features two detailed profiles for 'Frank Miller' and 'Joanna Miller'. Frank Miller's profile includes a phone number (867) 555-5555, email tedelstein@emoneyadvisor.com, birth date 6/1/1967, and occupation 'Owner at Buckingham Engineering'. Joanna Miller's profile includes a phone number (867) 333-3333, email jmiller@no-mail.com, birth date 3/20/1968, and occupation 'Nurse at Bryn Mawr Hospital'. Below these profiles are two sections: 'People' and 'Property'. The 'People' section shows five circular icons representing 'Peter' (PM), 'Mary Beth' (MM), 'Lucas' (LM), 'Elaine' (EG), and 'Stephanie' (SM), with an 'Add Person' button. The 'Property' section shows four colored boxes representing 'Cars' (purple with a diamond icon), 'Home' (green with a house icon), 'Jewelry' (purple with a diamond icon), and 'Vacation Mountain Home' (green with a house icon), with an 'Add Property' button.

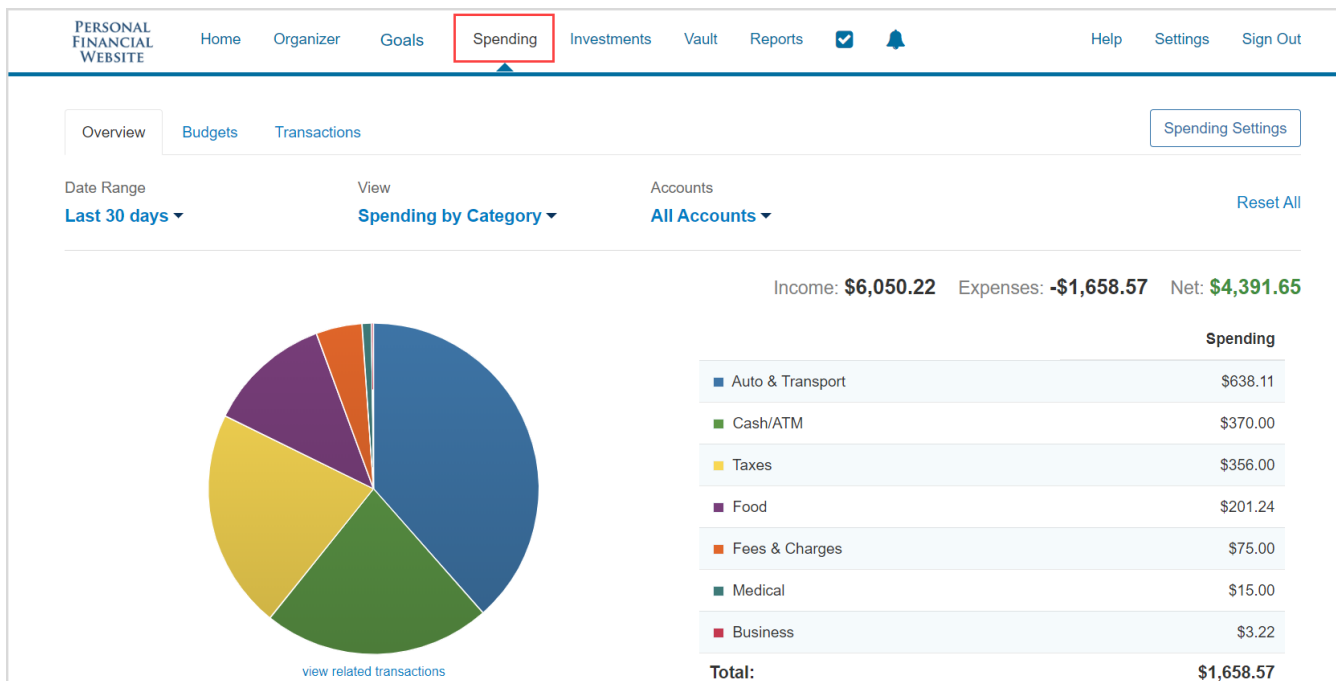
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The **Goals** page allows you to track your Goals overtime and view the impact they have on your overall financial situation. Clicking into a Goal provides insight into projected costs, funding, and suggested actions to improve your results.

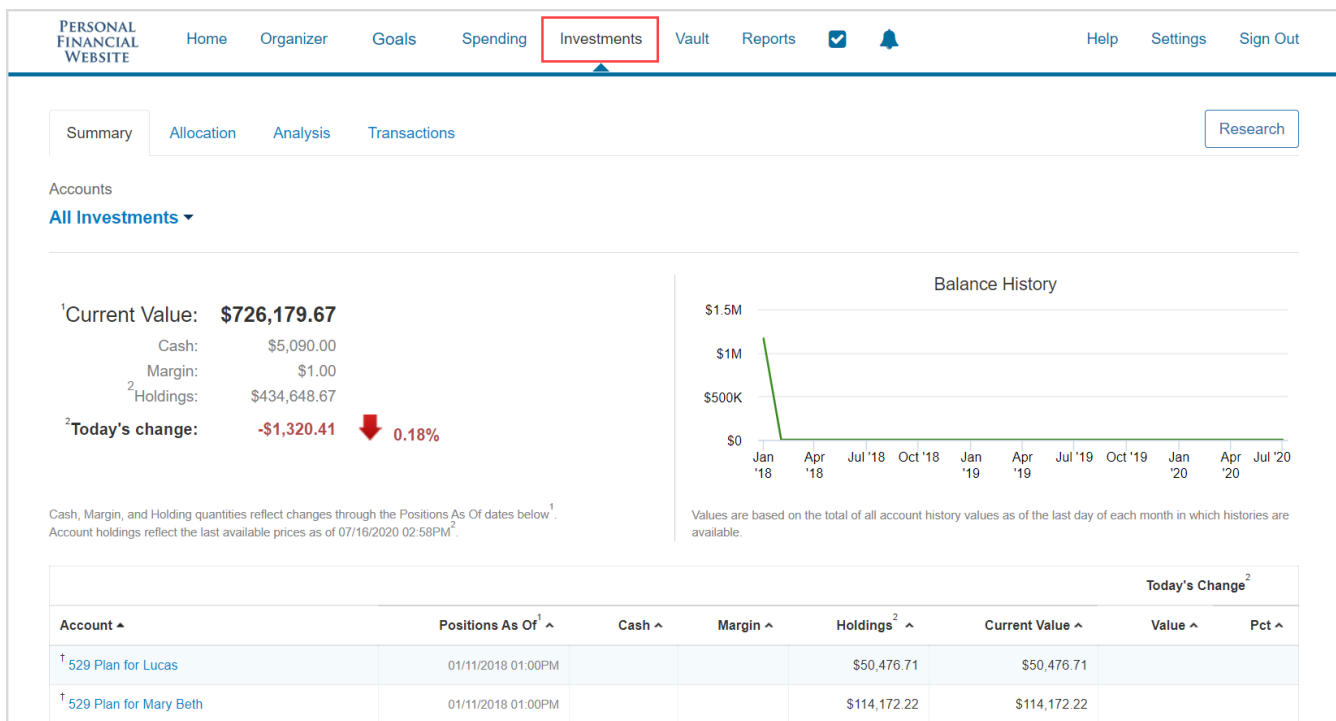


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The **Spending** page gives you a clear view of what you're spending each month. This area includes an **Overview**, **Budgets** tab, and **Transactions** tab. Use these three tabs together to create an accurate view of your spending and your current budget. Note that if there is no information on this screen, it is because a bank account or credit card needs to be added to the Accounts section within in your Organizer.



The **Investments** page is made up of four components – Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to view individual account activity and asset breakdowns.



# Personal Financial Website Overview

The **Vault** is a secure, searchable repository in which files are stored by your Advisor for your review, and where you can store files. To upload a file, click either the My Private Documents or Shared Documents folders, then click **Upload Files**. If you want your Advisor to see a document, upload into the Shared Documents folder. The My Private Documents folder contents are hidden from your Advisor

**Vault**

Files

search by name

Name	Size	Shared	Created
My Private Documents	0 Files		2/27/2017 at 1:47 pm
Shared Documents	10 Files		2/27/2017 at 1:47 pm

Usage: 400.34 KB (0 B are private)

The **Reports** tab provides you with a series of reports about your current financial situation.

Report Selection

**Balance Sheet**

**Balance Sheet**

	Frank	Joanna	Joint - ROS	Total
Assets	--	--	\$25,000	\$25,000
Asset Tax Type	--	--	62,684	62,684
Balance Sheet	40,249	--	--	40,249
Joanna's Roth IRA (converted)	--	143,509	--	143,509
Home	--	103,431	--	103,431
Vacation Mountain Home	--	--	850,000	850,000
Cars	--	350,000	--	350,000
Jewelry	--	--	60,000	60,000
Whole Life Policy on Frank	--	35,000	--	35,000
	14,500	--	--	14,500
<b>Total Assets:</b>	<b>54,749</b>	<b>631,940</b>	<b>997,684</b>	<b>1,684,373</b>

# Personal Financial Website Overview

The **Tasks** icon will alert you of any tasks assigned to you by your Advisor. Click **Complete** when you've finished the task to notify your Advisor.

PERSONAL FINANCIAL WEBSITE Home Organizer Goals Spending Investments Vault Reports **Tasks** Alerts Help Settings Sign Out

**Tasks Assigned to You** [Show Completed Tasks](#)

**Increase 403b Contributions** Aug 15, 2020  
 Hi Joanna - as discussed please touch base with your benefits department to make changes to your 403... [Show more](#) [Complete](#)

The **Alerts** icon allows you to view any triggered alerts. Click **Manage** to set up your Alert parameters.

PERSONAL FINANCIAL WEBSITE Home Organizer Goals Spending Investments Vault Reports Alerts **Alerts** Help Settings Sign Out

**Alerts** [Manage](#)

**REMINDER** Oct 10  
 October 9th - Annual Review

The **Settings** page is where you can set Alerts, update your Security information, such as passwords and security questions, and set your Privacy Settings which allows you to determine what level of access your Advisor has when viewing your Spending and Budgeting data.

PERSONAL FINANCIAL WEBSITE Home Organizer Goals Spending Investments Vault Reports Alerts Alerts Alerts Help **Settings** Sign Out

Alerts **Security** Privacy

**Privacy Settings**  
 This page allows you to manage your privacy settings. Use the controls below to determine how much access each individual has to your financial information.

**Spending Permissions**

	None Cannot view any spending data.	Limited Can view category spending and budgets.	Full Can view all data, including transactions.
<b>My Advisor</b>			
<b>Marcus Masters</b> Advisor	●	●	●